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iTP Partners, with Approximately $3.5 Billion in AUA and Nearly 50 Financial Advisors, Joins Cetera and Launches New Independent RIA

iTP chose Cetera as its growth partner – a firm that makes the big feel small while delivering the platform and service to scale. Cetera's defined growth system can help firms like iTP grow by adding clients and recruiting advisors

SAN DIEGO – Aug. 4, 2026 – Cetera welcomes iTP Partners (iTP) and its independent RIA, Blue Horizon Equity, Inc., which iTP launched upon joining Cetera. Co-founded by experienced financial advisors Bob Sansone and Jeff Hartman, iTP oversees approximately $3.5 billion in AUA1 across nearly 50 financial advisors.

With headquarters in Pittsford, New York, and an additional office in Ponte Vedra Beach, Florida, iTP joins Cetera from Osaic, and will operate on Cetera's Blueprint platform, designed to power growth for firms like iTP.

iTP has built a multi-state advisory practice on a culture of independence, shared ownership, and deep client relationships. The firm is distinguished by its structure: iTP advisors are not simply affiliated professionals – they are equity stakeholders in the enterprise they are building together.

When Sansone and Hartman set out to find a new partner, their mandate was clear: a firm that could make a large organization feel small in relationship and service, while delivering the technology, scale, and resources of a major firm. After an extensive due diligence process that included conversations with multiple broker-dealers, they chose Cetera.

What set Cetera apart was not a single tool, but a defined system for growth. Every Cetera firm operates inside the same model: a community of peers running comparable practices, a dedicated team organized around the firm's written growth plan, and the infrastructure that makes that plan executable.

RIAs like Blue Horizon Equity can run on Cetera's infrastructure layer called Blueprint, which is Cetera's integrated technology and services platform, purpose-built for registered investment advisers. Blueprint delivers RIA-level autonomy, multi-custodial flexibility, and modular middle-office infrastructure, enabling advisory firms to scale efficiently without having to build that infrastructure on their own.

Crucially for iTP and Blue Horizon Equity, Blueprint is not a rigid, one-size-fits-all system – it's intentionally shaped around the firms operating on it, with access to multiple custody and clearing options including Pershing, the platform iTP was already using and wanted to keep.

"Blueprint is a collaboration that gives iTP the infrastructure to scale on their own terms, backed by the technology, resources, service and support of Cetera overall," said Andina Anderson, Head of Blueprint for Cetera. "We're proud that iTP chose Cetera as its partner to help them write their next growth chapter."

"What I liked about Blueprint and Cetera's approach is that they're not rigid, and they're very willing to adjust to the needs at hand so things stay flexible as we move along. Cetera hasn't dug their heels in on anything, and that's refreshing," said iTP Managing Director Bob Sansone, a founding partner of iTP.

Cetera®

“From day one, we’ve had people to work with; it’s already a partnership with real people we can reach whenever we need them, and that says a lot about Cetera and how they’ll support us,” said Jeffrey Hartman, Managing Director at iTP. “The high level of service and attention we’re getting from Cetera isn’t something we’ve experienced in a long time, and it makes all the difference.”

Hartman said growth was a central objective of iTP’s transition to Cetera. The firm’s structure is designed to attract like-minded advisors and advisory teams seeking genuine equity participation, institutional-grade infrastructure, and a culture that prioritizes relationships over transactions. With active conversations already underway with advisors in several regions, iTP is pursuing significant additional asset growth in the near term – and is particularly well-positioned to appeal to experienced advisors and independent practices evaluating the RIA model who do not want to shoulder the complexity of standing up that infrastructure on their own.

“The RIA model is the future of our industry. At iTP, we have created a home where an advisor can participate in the benefits of our model – including real ownership through equity – without having to do all the work of building it from scratch,” Sansone said. “That’s a powerful value proposition, and Cetera’s Blueprint platform amplifies it.”

The iTP story began in 1971, when Sansone entered the financial services industry and spent the next quarter of a century building his career through Mutual of New York (the MONY Group). He later served as a corporate officer with MONY before transitioning to AXA’s large-firm recruiting division, where he first connected with Hartman. In 2010, Sansone co-founded iTrust Advisors, a general insurance agency. By 2014, the two had joined forces to build what would become iTP Partners, initially affiliating with American Portfolios before transitioning through the Advisor Group/Osaic succession.

Today, iTP and Blue Horizon Equity operate a nationally dispersed advisor base from their Pittsford flagship and Ponte Vedra Beach offices, with growth-oriented leadership that has structured the firm to attract the next generation of entrepreneurial advisors.

In welcoming iTP, Cetera Wealth Management President Todd Mackay said: “Bob and Jeff have spent decades proving that building a firm the right way – anchored by relationships, advisor ownership, and a genuine culture of service – is how to create lasting value. iTP is exactly the kind of firm Cetera was built to serve because they’re sophisticated, growth-oriented, and deeply committed to the advisors and clients who make it what it is.”

About Cetera

Cetera is the premier financial advisor Wealth Hub, empowering independent advisors and institutions with personalized support, flexible affiliation models, and end-to-end growth solutions. Home to approximately 12,000 financial professionals and institutions, Cetera's multi-channel ecosystem enables financial professionals to grow, scale or transition their businesses on their own terms.

Unlike traditional IBDs, Cetera offers true choice – blending modern technology, integrated wealth solutions, and a community-driven culture. Cetera's five-channel model and commitment to long-term advisor value provide a scalable blueprint for consistent, repeatable growth.

As of March 31, 2026, Cetera firms manage approximately $630 billion in assets under administration and $296 billion in assets under management. Its Voice of the Customer program has captured nearly 50,000 advisor reviews, with more than 43,000 five-star ratings, giving Cetera a 4.7 out of 5 satisfaction score.

Learn more at www.cetera.com and follow Cetera on LinkedIn, Instagram, Facebook, YouTube, and X.

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[1]Value approximated based on information provided to Cetera for asset holdings as of April 28, 2026.

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